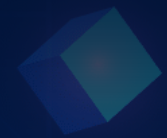
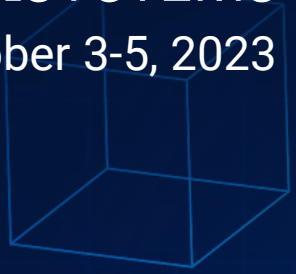


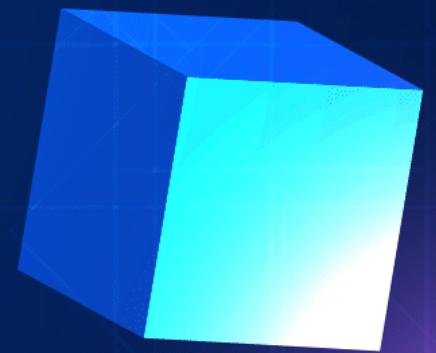


UC23 | October 3-5, 2023



New User Interface

Ben Riccio, Solutions Engineer, TMA Systems





Ben Riccio

Solution Engineer II

ben.riccio@tmasystems.com

—
I have been with TMA Systems as a Solutions Engineer since February of 2022. Prior to joining TMA, I worked as a Manufacturing Engineer in Ohio and Texas. I graduated from Ohio University in 2017 and have been living in Dallas, TX since February 2021. I was born and raised in Pittsburgh, PA.



Agenda

1. Overall plan for the new UI
2. Live Demo
3. New Dashboard Functionalities
4. Future Dashboard Functionalities
5. New Mobile Interface



Why Use the New UI?

The new UI has been created with efficiency in mind. Reducing the time it takes to complete common tasks and batch jobs was at the heart of this UI refresh. Finding the appropriate windows is now easier than ever.

56%

Less button clicks to update the status of a work order

56%

More efficient to schedule multiple work orders to a single technician

33%







Plus significant search time reduced by improved navigation and search

50%



Faster to create a PO/PR/WO

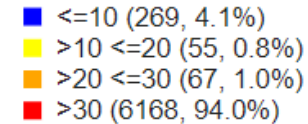
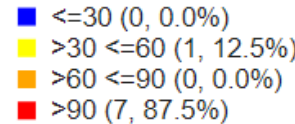


Action Menu

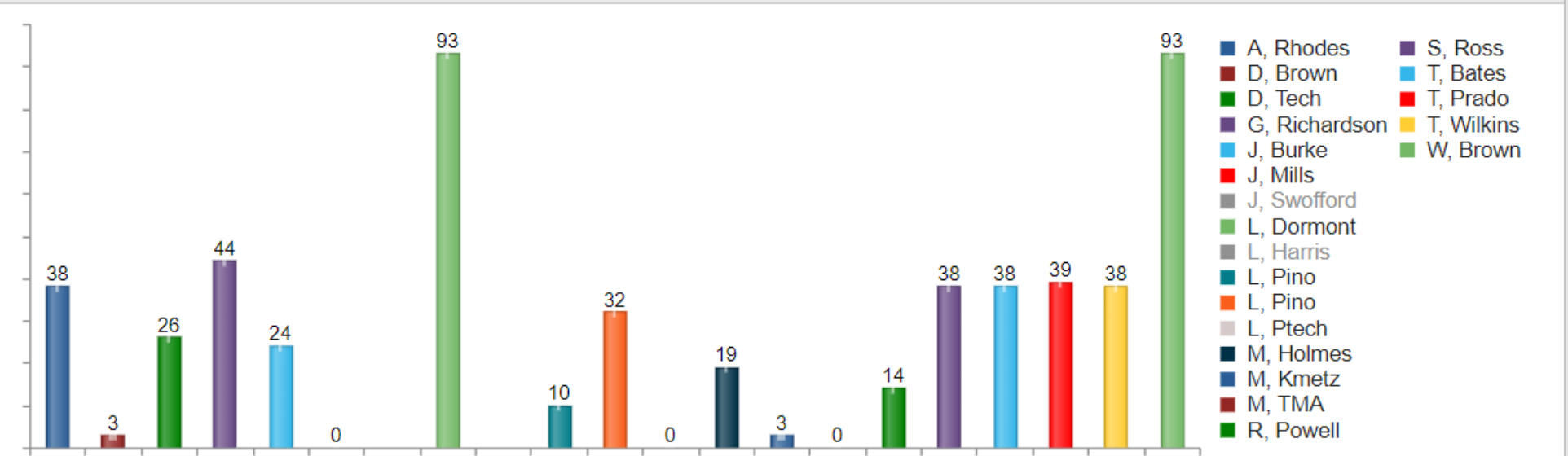
-  Refresh
-  Manage Tabs
-  Manage Controls
-  Add New Control
-  Full Screen
-  Add Favorite

HVAC Supervisor HVAC WO Management Director-PP Non-PM Management Director-PP PM Management

Open Non-PM-H...	Open PM-HVAC	Unscheduled WOs...	Work Order, Open By Days-HVAC	PMs, Open PMs By Days-HVAC
8	655	942		
Work Order, Closed Last 30-HVAC	Finished WOs-HV...			
0	13			



Open Work Orders by Tech-HVAC



- Favorites
- Transactions
- Material
- Organization
- Reports

Fast Find - Search

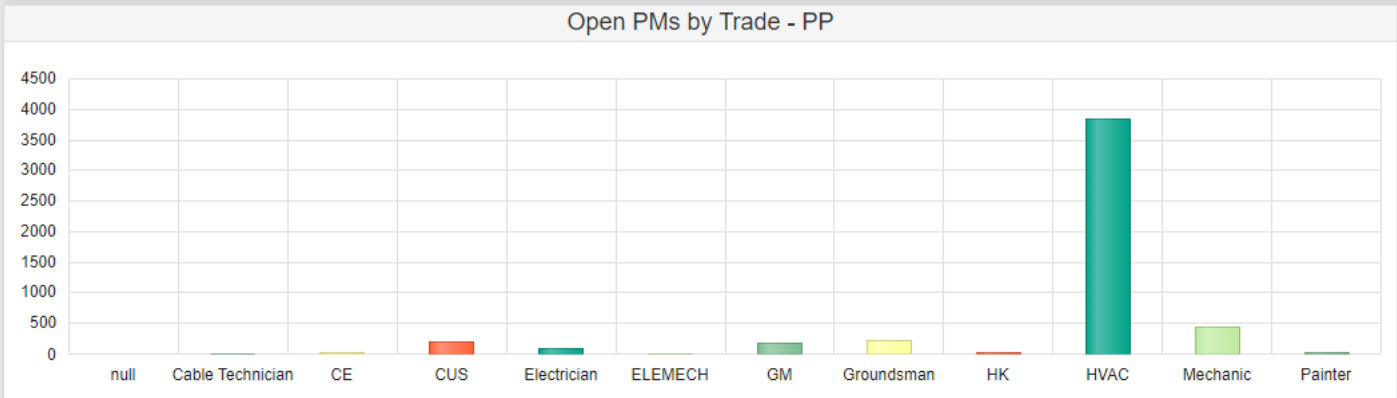
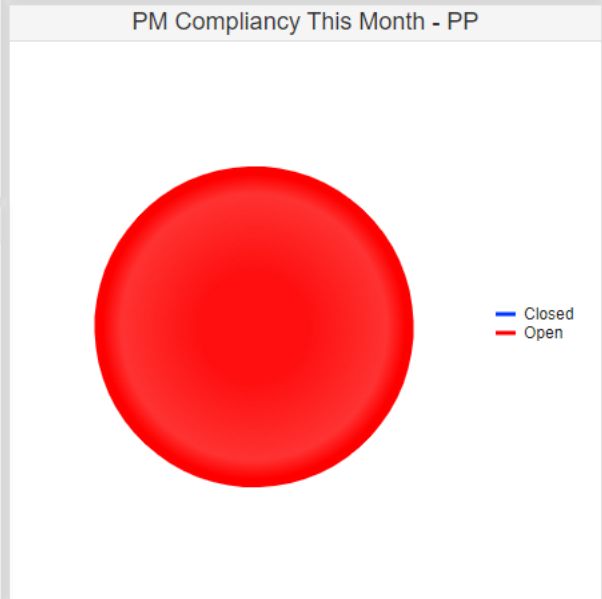
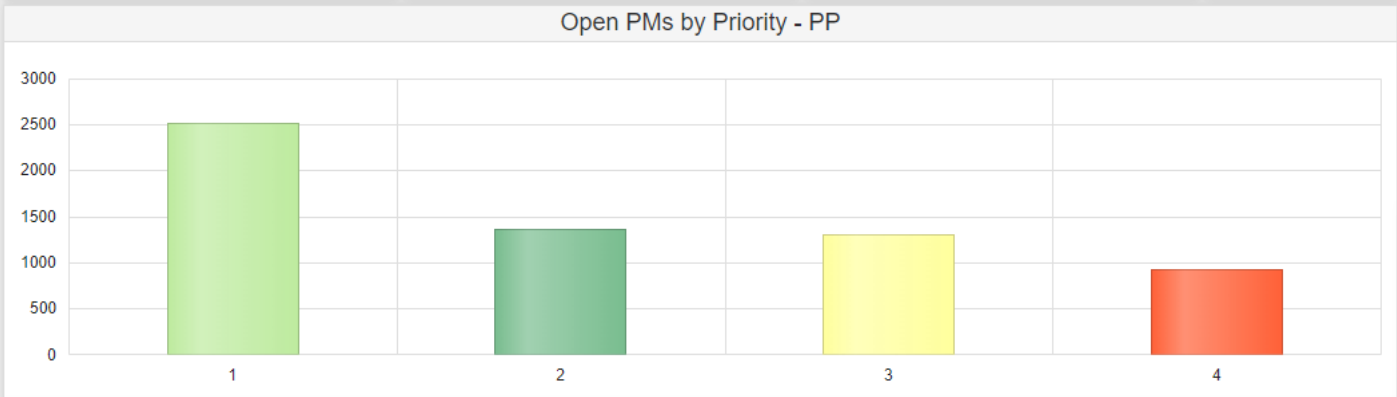
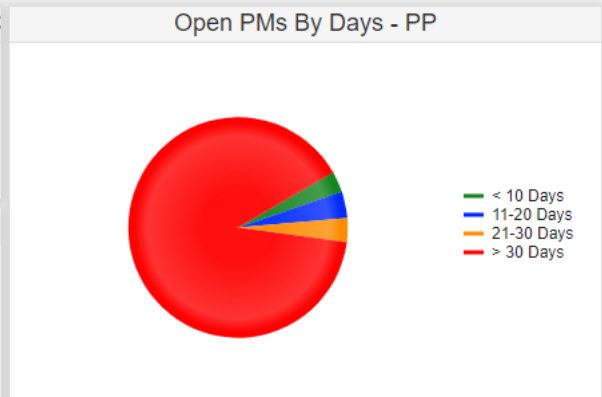
+ Add Edit Copy Delete

Action Menu

Manage Tabs

Capital Planning Custodial Custodial Inspections Director - PP Non-PM Management Director - PP PM Management My Work Procurement Projects Schedules - Electrician Schedules - GM Schedules - HVAC More

Open PM - PP	Unscheduled PM - PP	Finished PMs - PP	Closed PMs Last
6,101	5,127	0	188



- Action Menu
- Favorites
- Records
- Reports



File

Transactions

Material

Accounting

Organization

Admin

Reports



Home



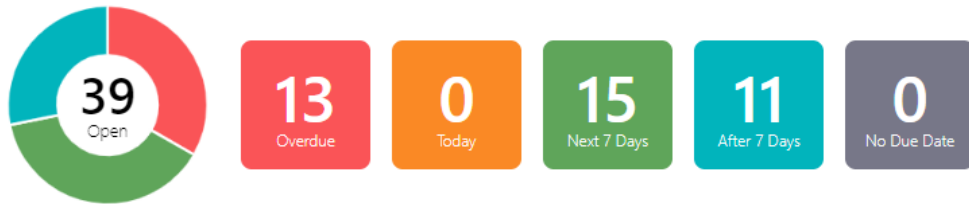
WORK ORDERS

- Work Orders Summary
- Work Order Tasks

ACTIVE TASKS

- Due Date Breakdown
- Active Task List

Due Date Breakdown



Active Task List

<p>FAC-10081 COR ROUTINE</p> <p>Need new pictures in the lobby</p>	<p>FACILITY</p> <p>Tax Administration of Jamaica</p> <p>Due 11/08/2023</p> <p>Wall Hangings</p>	
<p>FAC-10087 IP COR ROUTINE</p> <p>Perform Mechanical System Shutdown</p>	<p>BUILDING</p> <p>Building 4</p> <p>Due 11/08/2023</p> <p>Perform Mechanical System Shutdown</p>	
<p>FAC-10093 PM EMERGENCY</p> <p>Fire Alarm Panel</p>	<p>BUILDING</p> <p>Building 4</p> <p>Due 11/08/2023</p> <p>Fire Alarm Panel</p>	
<p>FAC-10094 PM EMERGENCY</p> <p>Fire Alarm Panel</p>	<p>BUILDING</p> <p>Building 4</p> <p>Due 11/08/2023</p>	



Live Demo



Future UI Improvements

The new UI will be expanded throughout WebTMA over the coming months. The next few slides are examples of some of the releases closest to the horizon.



WORK ORDER

Fast Find - Search [icon] [icon] + Add Edit Copy Delete First Prev Next Last Print [icon]

Identity Results Costs Billing Info Schedule Approval Routing History

- Action Menu
- ✕ Add to Deferment Queue
 - ✕ Check Results
 - Map It!
 - ✕ Key Adj
 - ✕ Post Cost
 - Post Meter Reading
 - Show Audit History
 - Tracking
 - ✕ Survey Results
 - Legend
 - Post This WO

General Information

Area 01-100 ⁱ
Office

Vehicle AVEC-01 ⁱ
Ford Van

Requestor Schaecher, Gary
Phone # 918-494-2890
Email jenny.pino@tmasystems.com

Notify Me

Status Parts are on order
Status Note Parts are on order

Closed

Work Order # PP-950003
Request Date 05/31/2022 00:00
Repair Center Code PP
WO Type Description 1 Corrective
WO Subtype
Priority Description Emergency > 2 Hours
Department Name Auxiliary Services
Speed Type C100-B100-C100-D105
Charge

Request Room is very cold.

Finish Date **Est. Start Date** 05/31/2021 00:00
Closed Date 11/11/2021 05:28 **Est. End Date**

Task Information

More Information

Request #
Event Code
Project#
Inspection Finding
Created from mobile device
Created from MedTester
Out of Service
Exclude from Requestor
SignOff Supervisor
Signoff Date

Reference # 1251121111
Supervisor Name Larry Wilson
Last Post Date 03/01/2021
Last Print Date 06/22/2021 14:28
Lapse Time -200d -17h -32m
Lapse Time (Finish) 141d 12h 22m
Tax Rate
Linked WO
Additional Ref

UDF

Comments from Conversation
Last Contact with Agency

Timed or not?

Estimate

Estimated Hours 12.00
Estimated Labor 330.00
Estimated Part 0.00

Estimate # E-10015
Estimate Rental/Other 0.00
Total Estimated Cost 330.00

Encumber

Prevent Archival

- Action Menu
- ★ Favorites
 - 📄 Records
 - 📊 Reports
 - 📎 Linked Documents



Work Order #Base-10002

Fix wall hangings for air handler unit



Post Work Order

Estimate

Send Survey

More Actions ▶

Identity

- General Information
- Task Information
- More Information
- UDF
- Estimate

Results

Costs

Billing Info

Schedule

Attachment

Approval Routing History

Linked WO

Invoices

General Information

Facility 003 ⁱ
East Campus

Requestor Al Wilson
Phone # 918-858-6634
Email user@noemail.com
Notify Me
Status In Service
Status Note Cancelled

Closed

Work Order # Base-10002
Request Date 03/28/2018 12:40 PM
Repair Center Code PP
WO Type Description 3 PM
WO Subtype
Priority Description 3 Routine
Department Name Facilities Management
Account # Multiple
Charge

Request Fix wall hangings for the air handler unit
Roof Construction

Finish Date
Closed Date 10/23/2019 01:17 PM

Est. Start Date 07/09/2019 10:33 AM
Est. End Date

Task Information

More Information

Request # 10003
Event Code 4433256
Project#
Created from mobile device
Created from MedTester
Out of Service
Exclude from Requestor
SignOff Supervisor Developer User
Signoff Date 10/23/2019 01:17 PM

Reference # Base-10456
Supervisor Name John John
Last Post Date
Last Print Date 03/03/2022 12:25 PM
Lapse Time 574d 0h 37m
Lapse Time (Finish) 1633d 1h 15m
Tax Rate Tea Tax
Linked WO Base-10302
Additional Ref

UDF

Estimate

REPORTS

- Cost Work Order
- Jerry's Report
- Mickey
- Network - Telecom estimate adding O...
- Work Order - Pick Part List
- Work Order with Signature

LINKED DOCUMENTS

- Btn_EquipmentMake Icon.png
- Test URL

Fast Find - Search

Identity Results Costs

Action Menu

- Add to Deferment Queue
- Check Results
- Map It!
- Key Adj
- Post Cost
- Post Meter Reading
- Show Audit History
- Tracking
- Survey Results
- Legend
- Post This WO

General Information

Area

Vehicle

Requestor

Phone #

Email

Notify Me

Status

Status Note

Request

Finish Date

Closed Date

Task Information

More Information

Request #

Event Code

Project

Inspection Finding

Created from mobile device

Created from MedTester

Out of Service

Exclude from Requestor

SignOff Supervisor

Signoff Date

UDF

Comments from Conversation

Last Contact with Agency

Estimate

Estimated Hours

Estimated Labor

Estimated Part

Prevent Archival

xClosed Last 30 - HVAC Default Owner: TMA User

Public Public/No Edit Private

Work Order #	Request Date	Building Name	Priority Description	Status (Full)	Technician Name	Task Description	Request
CU-18381	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	Frank Johnson	HVAC Issue	Repair Heater
CU-18381	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	George Richardson	HVAC Issue	Repair Heater
CU-18382	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	Frank Johnson	HVAC Issue	Repair Heater
CU-18382	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	George Richardson	HVAC Issue	Repair Heater
CU-18383	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	Frank Johnson	HVAC Issue	Repair Heater
CU-18383	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	George Richardson	HVAC Issue	Repair Heater
CU-18384	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	Frank Johnson	HVAC Issue	Repair Heater
CU-18384	09/27/2022 07:00	Adminstration Building	Routine < 2 Days	Completed	George Richardson	HVAC Issue	Repair Heater
CU-18385	09/27/2022 07:00	Pardee Legal Research Center	Routine < 2 Days	Completed	Frank Johnson	HVAC Issue	Repair Heater
CU-18385	09/27/2022 07:00	Pardee Legal Research Center	Routine < 2 Days	Completed	George Richardson	HVAC Issue	Repair Heater

items per page
 1 - 158 of 158 items



Work Orders

NEW

EXPORT

SELECTED



More Actions

All Work Orders

<input type="checkbox"/>	WO-#	REQUEST DATE	BUILDING NAME	TASK TYPE	REQUEST	
<input checked="" type="checkbox"/>	BASE-10002	09/10/2022 9:52 AM	Athletics Building	Carpentry	Drawer is stuck on desk test from req 007...	▼
<input checked="" type="checkbox"/>	BASE-10302	09/06/2022 10:12 AM	Admin Building	Construction	New Partition needed	▼
<input checked="" type="checkbox"/>	BASE-10512	09/05/2022 11:06 AM	Admin Building	Custodial	Stain on conference room carpet	▼
<input type="checkbox"/>	ABC-123456	09/02/2022 7:32 AM	Koenig Hall	Electrical	Outlet not working	▼
<input checked="" type="checkbox"/>	BASE-10563	08/30/2022 9:52 AM	Commons	Carpentry	Cabinet won't open	▼
<input type="checkbox"/>	FOO-10002	08/30/2022 10:52 AM	Library	Custodial	Books all over the place	▼
<input type="checkbox"/>	FOO-10022	08/30/2022 9:32 AM	Athletics Building	Inspections	Annual tile inspection	▼
<input type="checkbox"/>	BASE-10053	08/27/2022 9:18 AM	Athletics Building	Plumbing	Faucet slow leak	▼
<input type="checkbox"/>	BASE-10089	08/26/2022 1:25 PM	Admin Building	Custodial	Cobwebs out of control	▼
<input type="checkbox"/>	ABC-20005	08/20/2022 3:45 PM	Admin Building	Carpentry	Stair creaking ominously	▼
<input type="checkbox"/>	BASE-10403	08/18/2022 9:52 AM	Library	Construction	More shelves, more books	▼
<input type="checkbox"/>	BASE-10123	08/16/2022 9:52 AM	Library	Electrical	Flickering light above meeting table	▼
<input type="checkbox"/>	BASE-10503	08/16/2022 9:52 AM	Commons	Carpentry	Partition wall required	▼
<input type="checkbox"/>	BASE-11103	08/16/2022 9:52 AM	Athletics Building	Carpentry	Door jamb cracked	▼

REPORTS

- Aging Report by Building
- Aging Report by Repair Center
- Completed work order by Type
- Cost Summary By Task Type
- Facility Work Order Detail
- Maintenance Summary Report
- Open Work Orders by Trade
- Open Work Orders by Trade Chart
- Service Calls Closed

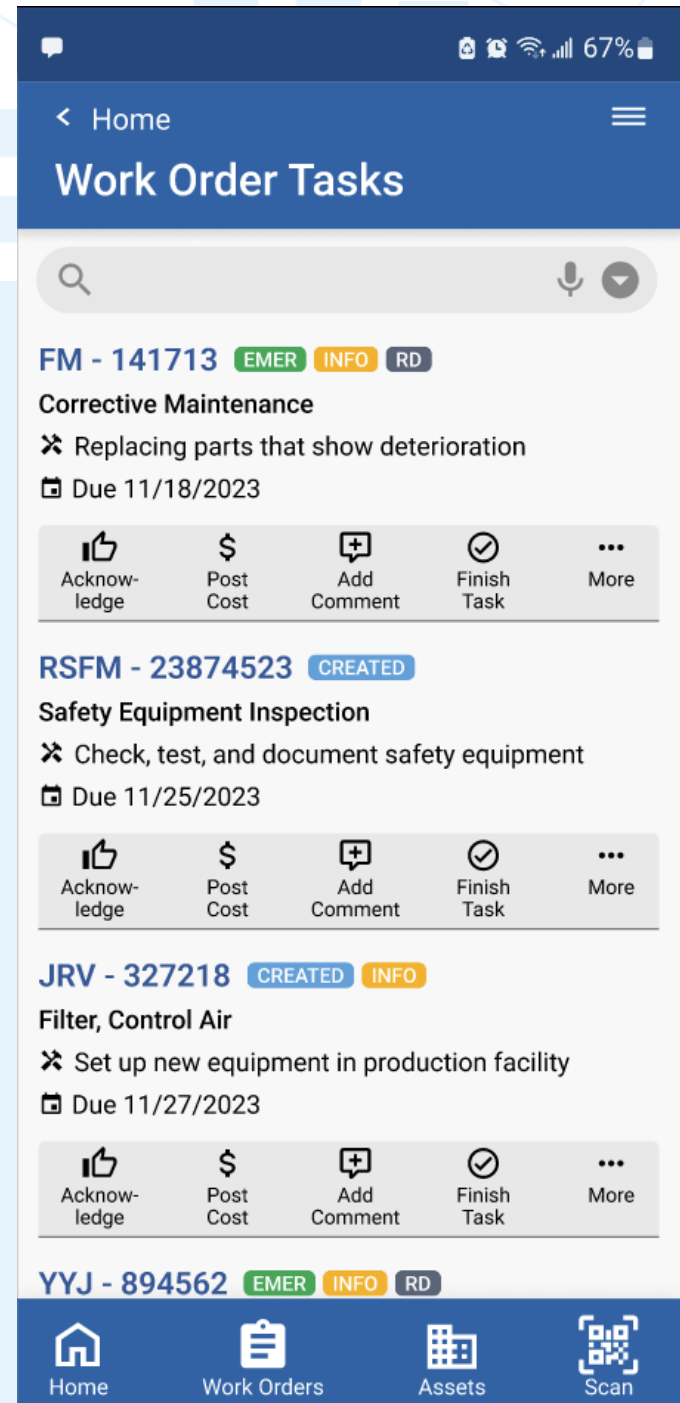
Future Mobile Improvements

We will be consolidating our mobile apps to one single application. The new UI will be reflected in mobile as well.

On the next few slides, we will see a few examples of what this will look like.

There is an entire session dedicated to review the new plans for our mobile application.





©



Home



Work Orders



Assets



Scan

REQUEST

Filter, Control Air

TASK

HVAC | Repair/Replace filter type C4256B12

DUE DATE

Due 11/06/2023

LOCATION

Koenig Hall, Area 105

TECHNICIANS

Eric Van Heusen, Trade 44273

- 👍
 Acknowledge
- 💰
 Post Cost
- 💬+
 Add Comment
- ✅
 Finish Task
- ⋮
 More



Home



Work Orders



Assets



Scan

- Post Labor
- Post Materials
- Post Other Charge

Posted Costs

LABOR COSTS

1	HRS	DATE	TECHNICIAN
	4.5	11/10/2003	Song Vang

OTHER CHARGES

1	AMOUNT	DATE	COMPANY
	\$925.00	11/10/2003	Ace Hardware
	PRODUCT		
	Assorted Lumber		

MATERIAL COSTS

1	QTY	PART	DATE
	3	Ace Hardware	09/26/2003



Home



Work Orders



Assets



Scan

Thank You. Q&A

ben.riccio@tmasystems.com | tmasystems.com